

## HelloSign Tip Sheet for Berkeley Lab Performance Management Process: For Supervisors

- After you've completed the written review, selected a proposed rating and incorporated the one-up reviewer/s comments, you may **finalize the review after**:
    - You have received confirmation from your Division Management that the proposed rating/s are accepted.
    - You are ready for the employee to see his/her review.
  - Once the review is marked final, the document will be shared with the employee when they login to the pmp website ([pmp.lbl.gov](http://pmp.lbl.gov)), although they will not receive any email notification.
    - This enables the employee to review the performance review document and come prepared to discuss his/her performance at the review meeting.
  - Performance discussions should occur during the prescribed time period as defined on the
    - HelloSign does not eliminate the requirement of a performance review discussion
    - Your signature indicates that you have discussed the content of the performance review.
  - Schedule the performance review meeting in a private office or conference room.
    - Have a computer/tablet available to sign the review during the meeting.
    - If the employee requests time to add comments to the review, you may set a date (within 5 days) for them to return the electronically signed review with comments.
    - If the employee refuses to sign the review, there are two options:
      - If the employee still does not agree with facts in the review after your conversation with him/her, your employee may enter comments in comment box in HelloSign and then electronically sign as normally would through electronic signature process.
      - If employee wishes to not sign the review, in HelloSign signature box s/he may type in "I decline to sign this review" and then forward review back to the supervisor.
      - Both you and your employee must complete this process within the deadline.
- To initiate the signing process, click "Initiate signing"**

### **Tip for Signing:**

To allow the employee and supervisor to sign on one computer, one may log off so the other can log into his/her email or open a new "Incognito" or "Private" window under the file menu of your web browser.

Need help? ▶

All changes saved automatically

Supervisor Table

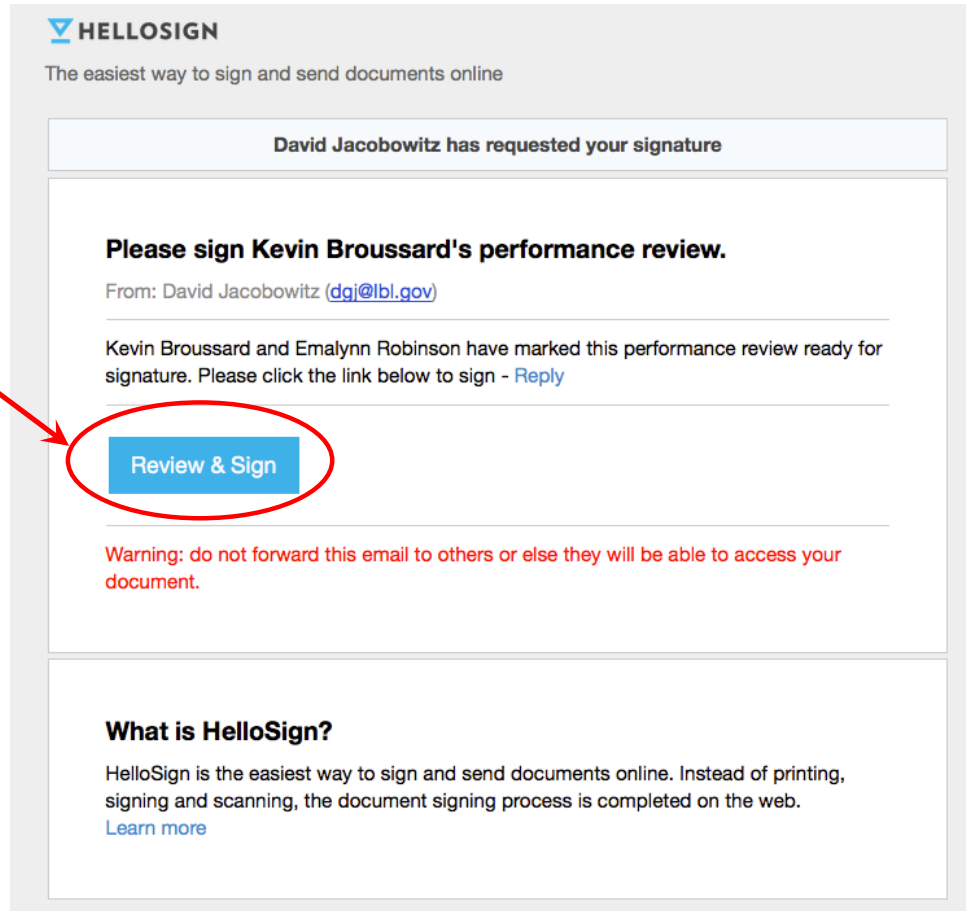
Search:

Employee	Self Assessment	Performance Review	Proposed Rating	Performance Review Actions	Reviewed By	HR Review Status
Broussard, Kevin (003958)	Final document	Final document Signed document	None-entered			
Brown, Jennifer (027693)	Final document	Final document	None-entered	Initiate signing		

Showing 1 to 2 of 2 entries

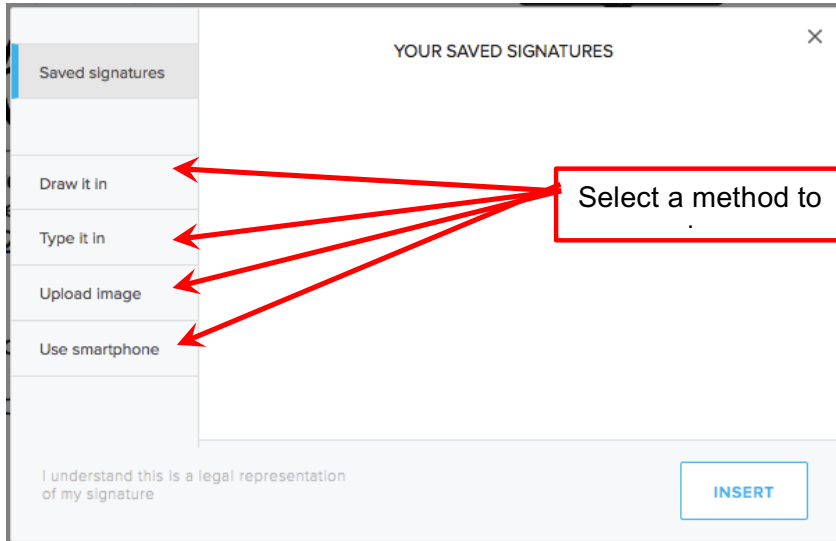
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- To sign, the supervisor and employee should click the link in the email sent via HelloSign
  - Subject line of email will be "Signature requested by Performance Management Process Team."
  - Click "Review & Sign."



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- Use one of the following methods to sign:
  - Draw it in: sign directly into HelloSign with a mouse (this is best done with a laptop touchpad and stylus/finger; but may also be done with any mouse)
  - Type signature.
  - Upload image file: sign a blank sheet of paper and scan it as an image; then upload the electronic image of the signature.
  - Add via Smartphone: sign a blank sheet of paper and take a photo of it.



- Insert your signature.
- Click “Agree” to submit your legal signature.
- You will receive email confirmation you have signed the document.
- All required signatures must be received prior to the Performance Review deadline.

### Receive an error?

- If the system times out while you are waiting for your signature to upload, try refreshing the browser.
- If you click the link from your email and the document is not available, click the button to log into HelloSign via Google.

HelloSign Video Demonstration: <http://www.screencast.com/t/P0waiYLqdK%EF%BB%BF>